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community foundation<sup>®</sup>

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## Mason County

### Sample Bequest Language

We want to talk with you! We provide this language below as a service to you and your estate planning advisor. We love to talk with people who are making plans for future gifts for a couple of reasons. First, we want to thank you! And second, we want to be sure we understand your wishes and can carry them out as you intend.

If you're willing to meet with Community Foundation staff to discuss what you'd like your gift to support, the following language is recommended:

I give to Community Foundation for Mason County, an affiliate of the Community Foundation for Muskegon County, a Michigan nonprofit corporation (EIN 38-6114135), [specific property, %, or \$], with the request that such funds would be used for purposes I may have from time to time recommended to the Community Foundation in writing during my lifetime.

This approach is preferred because it allows you to address multiple charitable interests and provides the opportunity for you to revise your wishes easily without incurring the cost of a will or trust revision. We capture your intentions for your gift in an "Estate Plan Distribution Agreement," which is signed and kept on file. If your interests or plans change – as they often do – you simply need to discuss with us to update the agreement. It also allows us to thank you in advance for the gift you're giving.

If you prefer not to meet with Community Foundation staff to discuss your eventual gift, the following language is recommended:

I give to Community Foundation for Mason County, an affiliate of the Community Foundation for Muskegon County, a Michigan nonprofit corporation (EIN 38-6114135), [specific property, %, or \$], to be held, administered, and used by its Board of Trustees for support of its grantmaking and programming in the areas of [greatest need and opportunity].

Since this is a gift that will be a permanent resource for our community, "greatest need and opportunity" is the most powerful gift you can give to the community of the future. Your gift will be used where it's needed most each year – forever. If you prefer that your gift supports a more specific aspect of community life, this language could be narrowed to address the areas of education, the arts, social justice and equity, health and human services, environmental causes, etc. If you're a professional advisor and have questions about the use of your client's intended gift, please don't hesitate to contact us; we can provide information to you while your client remains anonymous to us.